Termination Checklist

Upon notification of termination:

☐ Review Employee's Job Data, Personal Information, Current Benefit Summary and Absences (will need this info for paperwork).

☐ Notify employee that their benefits will be ending. Refer them to the Termination Life Event page for more info: https://www.wisconsin.edu/ohrwd/benefits/life-events/empcha/term/. Once TERM event is processed, UW-Shared Services, Service Operations will send a COBRA letter to the employee with continuation and conversion information. Employee must request continuation/conversion applications from UW-Shared Services, Service Operations.

☐ If employee is enrolled in FSA for the current plan year, ask the employee if they want to contribute the remaining amount of their annual pledge via their **last** paycheck. This will allow them to incur expenses through the end of the plan year. If the employee does not contribute their entire annual pledge via payroll, or through continuation, they may only incur expenses through the end of month in which they terminate. (Note: If employee is NOT enrolled in FSA for the current year, but have carryover from the prior year, they may only incur expenses through their termination date.)

☐ If Faculty/Academic Staff/Limited Appointee (FA/AS/LI) – Obtain missing leave reports, if applicable.

Before employee's final pay period begins to calculate:

☐ If employee would like to contribute the remaining amount of their annual pledge via their **last** paycheck before termination, create FSA Event and change Medical FSA election (must be done before TERM Event is closed - see below).

☐ Have HR enter termination into Job Data (terminate **all** jobs applicable).
   • Entering the termination will create a TERM Event in On Demand (in overnight process). The TERM Event will process the night of the termination date (regardless of when the termination is entered into HRS).
   • A TERM Event may be "forced" to close early to prevent the necessity for benefit refunds (because we pay benefits one month in advance and most benefits end in termination month).
   • If you would like to avoid benefit refunds, you or UW-Shared Services, Service Operations (via a WiscIT request) may force the TERM Event to close early and terminate benefits before premiums for future months are deducted. Wait until the TERM Event has a number after it – i.e. TERM1 – to close it.

During last pay period calculation:

☐ If FA/AS/LI— Ensure all leave reports have been submitted/entered. In addition, obtain current month's leave report and enter absences prior to last calc.

☐ Enter Vacation, Personal Holiday, Floating Legal Holiday, Banked leave/ALRA Payouts/Paybacks (Termination in HRS must be entered for HRS to calculate payouts/paybacks). Confirm Payouts/Paybacks on Review Paycheck.

After payroll calculation:

☐ Print COBRA letter from Cypress and place in employee's benefits file.

☐ Print Review Absence Balance screen for folder (to show balances are at zero, except Sick Leave).

☐ If employee is 55+ years old or has 20 years of creditable service, complete Sick Leave Certification (must wait until final payroll calculates).

☐ Submit online Sick Leave Certification in ETF's ONE System.

☐ Submit a request to UW-Shared Services, Service Operations to zero out sick leave (attach sick leave certification).

☐ Send copy to employee with sick leave insert.

☐ Keep copy for employee's file.

☐ Print copy of email to UW-Shared Services, Service operations for file.